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TO: Distribution DATE: June 3, 1996

FROM: Market Information / Bruce Neidle

SUBJECT: INTEGRATED WEEKLY NIELSEN REPORT-WEEK ENDING 5/25/96

ALL OUTLETS COMBINED (Weekly)

- PM's share declined -0.1 point this week to 49.4%, with Marlboro and OPB accounting for a majority of the loss.
  - PM's share of the Premium category was down -0.1 point to 57.6%.
- Marlboro's weekly share was down -0.1 point to 33.2%. Performance was likely affected by diminishing retail promotional support, including a reduction in the availability of the side-by-side product. Positive performance in supermarkets (+0.1 point) was likely influenced by continued coupon redemption of the "Marlboro May Offensive" direct mail program.
  - The franchise's share in supermarkets reached a record high of 26.8% this week.
- OPB's share was down -0.1 point to 9.0%, with each of the franchises declining slightly (except Parliament, which was stable).
  - Virginia Slims's free product incidence (primarily B2G1F) expanded +5 points since the w/e 5/4 to 6% of c-stores.
  - During its third full week at retail, Parliament Menthol's AOC share in Region 1 was 0.4%.
- Basic's share of industry and its share of category remained relatively stable at 4.6% and 17.2%, respectively.
- The Discount category was up +0.1 point this week to 26.7%. Liggett PL, Doral and Monarch gains more than offset RJR PL, Misty and GPC declines.

Monthly

- After reaching a record high share level last month, PM's monthly share declined -0.4 points in May to 49.4% (down from 49.9% in April due to rounding). PM's performance was primarily influenced by MBSS related promotional declines for Marlboro and Basic, partially offset by redemption of the "May Offensive" direct mail coupons.
  - Marlboro's share declined -0.4 points versus its record April level to 33.3%.
  - Basic's share of industry and share of category declined -0.1 and -0.7 points, respectively.
- Each competitive manufacturer posted a share gain during May (with the exception of Liggett, which was stable).
- Newport's share advanced +0.1 point to 4.9%, its highest monthly level to date.
- The Discount category rebounded +0.2 points versus month-ago to 26.7%, with Doral and GPC each posting a +0.1 point gain.

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CONVENIENCE STORES (Weekly)

- PM's weekly share declined -0.1 point versus week-ago to 50.1%, as Marlboro and OPB losses were partially offset by slight PM Discount gains.
- Marlboro's share declined -0.1 point versus week-ago to 35.3%, corresponding with a continued fall-off in retail promotional support.
- OPB's share trailed week-ago by -0.1 point to 7.9%, with slight losses by each of the major franchises (except Parliament).
- Basic's share of industry and share of category remained relatively stable this week at 4.7% and 17.2% (versus 17.3% last week due to rounding), respectively.
- The Discount category was up +0.2 points versus week-ago to 27.3%, with Liggett PL (+0.2), Doral (+0.1) and Monarch (+0.1) realizing the largest gains, while GPC, Misty and RJR PL experienced the largest losses (down -0.1 point each).
  - Doral likely benefited from continued expansion of its B2G1F deal to 19% of c-stores (up +5 points versus week-ago).

Monthly

- PM's monthly share declined -0.7 points from its record high month-ago level to 50.4%. PM's performance was primarily influenced by MBSS related promotional declines for Marlboro and Basic.
  - Marlboro's share declined -0.6 points versus its record April level to 35.6%.
  - Basic's share of industry and share of category declined -0.2 and -0.7 points, respectively.
- Each competitive manufacturer posted a share gain during May ranging from +0.3 points (for RJR) to +0.1 point (for Liggett).
- The Discount category rebounded +0.3 points versus month-ago to 27.1%, with Doral (+0.2) and GPC (+0.1) posting the largest gains.

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